

TOWN MANAGER EVALUATION – COMPOSITE SCORING

AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
<p><u>ORGANIZATION AND PROGRAM MANAGEMENT</u></p> <p>1. Plans and organizes the work that carries out policies and provides services established by Amherst Town Government Act, (Select Board, and Town Meeting) and State statutes.</p>		1		2	2		
<p><u>FISCAL MANAGEMENT</u></p> <p>2. Plans and organizes the preparation of an annual budget.</p>			1	2	2		
<p>3. Plans, organizes and administers the adopted budget within approved revenues and expenditures.</p>		1	1		3		
<p>4. Seeks all possible revenue sources for the Town.</p> <p>a) Promotes Economic Development</p> <p>b) Explores regionalization</p> <p>c) Reorganizes town departments where feasible</p> <p>d) Explores new revenue sources from educational institutions</p>		1			4		
AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
<p><u>PHYSICAL PLANT MANAGEMENT</u></p> <p>5. Plans and organizes maintenance of town-owned facilities, buildings and equipment.</p>				2	1	2	
<p>6. Plans and organizes maximum utilization of public facilities.</p>			1	1		3	

<u>RELATIONSHIPS WITH THE BOARD</u>		2	1	1	1		
7. Keeps the Board informed on issues, needs and operations of the Town.			1	2	2		
8. Makes professional recommendations to the Board on items requiring Board action.			2	2		1	
9. Interprets and executes the intent of Board policy.		1	1	2	1		
10. Maintains a professional, impartial and effective working relationship with the Board.			2	1	1	1	
<u>LONG RANGE PLANNING</u>							
11. Plans and organizes a process of program planning in anticipation of future Town needs and problems.		1	1		2	1	
12. Maintains a knowledge of new technologies, systems and methods, etc. in relation to Town services.	1	4					
<u>STAFF AND PERSONNEL RELATIONSHIPS</u>		5					
13. Models sound personnel procedures and practices in oversight of human resources function.	2	3					
14. Selects, leads, directs and develops Town staff.							
15. Develops good staff morale and loyalty to the Town.							
AREAS OF RESPONSIBILITY <u>STAFF AND PERSONNEL RELATIONSHIPS continued</u>	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
16. Recruits and assigns the best available personnel in terms of their competencies.		1	2	2			
17. Leads the negotiations of labor contracts representing Town interests and Board guidelines.		1	2	2			

<u>COMMUNITY RELATIONSHIPS</u>		1	1	2	1		
18. Gains respect and support of the Community on the implementation of Town programs and services.			1	2	1	1	
19. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to public perception exists in employees coming in contact with the public.			1	1	3		
20. Represents the Town to media as Chief Public Relations spokesperson on Town government issues.			1	1	3	1	2 marks from one member
<u>INTERGOVERNMENTAL RELATIONS</u>							
21. Maintains awareness of developments and plans in other jurisdictions, including the colleges and university, that may relate to or affect Town government.							
AREAS OF RESPONSIBILITY <u>PERSONAL CHARACTERISTICS</u>	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
22. Defends principle and conviction in the face of pressure.	1	2	1	2	1		2 marks from one member
23. Uses language effectively in dealing with staff members, the Board and the public.		3	1		1	1	
24. Speaks well in front of large and small groups, expressing ideas in a logical and forthright manner.			1	1	3		

Scores By Area *(Some SB members checked “unable to judge” and/or had 2 scores in certain areas)*

ORGANIZATION AND PROGRAM MANAGEMENT

Satisfactory or better = 4/5 (80%)

FISCAL MANAGEMENT

Satisfactory or better = 13/15 (87%)

PHYSICAL PLANT MANAGEMENT

Satisfactory or better = 5/5 (100%)

RELATIONSHIPS WITH THE BOARD

Satisfactory or better = 16/19 (84%)

LONG RANGE PLANNING

Satisfactory or better = 7/8 (88%)

STAFF AND PERSONNEL RELATIONSHIPS

Satisfactory or better = 8/25 (32%)

COMMUNITY RELATIONSHIPS

Satisfactory or better = 17/19 (89%)

INTERGOVERNMENTAL RELATIONS

Satisfactory or better = 4/5 (80%)

PERSONAL CHARACTERISTICS

Satisfactory or better = 11/17 (65%)

TOWN MANAGER EVALUATION – ANNE AWAD

AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
<p><u>ORGANIZATION AND PROGRAM MANAGEMENT</u></p> <p>1. Plans and organizes the work that carries out policies and provides services established by Amherst Town Government Act, (Select Board, and Town Meeting) and State statutes.</p>		X					Overall is satisfactory but occasionally takes on responsibilities of Select Board in ATGA. Needs to observe the boundaries and the checks and balances of the ATGA. (examples: Negotiating sewer rates with UMass, writing the welcome letter in the Amherst-Northampton Chamber booklet (he's in there along with Claire Higgins – I used to do that letter, it is the elected official role)
<p><u>FISCAL MANAGEMENT</u></p> <p>2. Plans and organizes the preparation of an annual budget.</p>			X				He does a good job. He could consult with SB on priorities more and SB/Mgr could try to resolve so it doesn't become a debatable issue with FinCom.
<p>3. Plans, organizes and administers the adopted budget within approved revenues and expenditures.</p>				X			He manages budget well.
<p>4. Seeks all possible revenue sources for the Town.</p> <p>a) Promotes Economic Development</p> <p>b) Explores regionalization</p> <p>c) Reorganizes town departments where feasible</p> <p>d) Explores new revenue sources from educational institutions</p>		X					He does well on seeking to increase revenues (ambulance fees to other towns). He needs to reorganize town departments to improve function and conserve \$\$ (Bangs could share admin staff across all programs, Planning and Conservation is confusing, Human Resources is in need of analysis). His agreement with Umass was compromised, we could have done better. The agreement with Amherst College is very weak – they should be comparable to what Williams does for Williamstown. The Amherst College connection within Town departments/committees/Boards is a problem that needs objective analysis.

AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
<u>PHYSICAL PLANT MANAGEMENT</u>				X			
5. Plans and organizes maintenance of town-owned facilities, buildings and equipment.				X			
6. Plans and organizes maximum utilization of public facilities.				X			
<u>RELATIONSHIPS WITH THE BOARD</u>			X				
7. Keeps the Board informed on issues, needs and operations of the Town.			X				
8. Makes professional recommendations to the Board on items requiring Board action.			X				Occasionally gives advice on issues that are political, he should stay more in background and not step out – media plays it as potential competition with SB.
9. Interprets and executes the intent of Board policy.			X				
10. Maintains a professional, impartial and effective working relationship with the Board.				X			Seems to be responsive to individual Board members and overall is professional.
<u>LONG RANGE PLANNING</u>			X				
11. Plans and organizes a process of program planning in anticipation of future Town needs and problems.			X				
12. Maintains a knowledge of new technologies, systems and methods, etc. in relation to Town services.		X					Overall defers to IT Director and not sure he himself grasps the IT system. New website, continual problems with e-mail a problem.
<u>STAFF AND PERSONNEL RELATIONSHIPS</u>		X					Model of using former HR Director to supplement current HR Director is not cost-effective. The Dept probably does need two employees, they could be moved under John Musante
13. Models sound personnel procedures and practices in oversight of human resources function.							

14. Selects, leads, directs and develops Town staff.		X					He inherited some problems but not clear that he has introduced structure to resolve/improve. Has established good working relationship with John Musante and role.
15. Develops good staff morale and loyalty to the Town.							Survey of Department Heads/Sr. Management indicates some morale issues. Support staff in Town Hall and Bangs have issues.
<div>AREAS OF RESPONSIBILITY</div> <div><u>STAFF AND PERSONNEL RELATIONSHIPS continued</u></div>	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
16. Recruits and assigns the best available personnel in terms of their competencies.			X				
17. Leads the negotiations of labor contracts representing Town interests and Board guidelines.			X				I do question the use of the former consultant to this process. A new approach with a different consultant might have moved the fire contract along (maybe)
<div><u>COMMUNITY RELATIONSHIPS</u></div> <div>18. Gains respect and support of the Community on the implementation of Town programs and services.</div>				X			Well regarded by the public.
19. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to public perception exists in employees coming in contact with the public.			X				There remain some front desk issues with a scowling face regularly at the Central Services Desk.
20. Represents the Town to media as Chief Public Relations spokesperson on Town government issues.				X			Responds promptly to get information to the Community.
<div><u>INTERGOVERNMENTAL RELATIONS</u></div> <div>21. Maintains awareness of developments and plans in other jurisdictions, including the colleges and university, that may relate to or affect Town government.</div>			X				

AREAS OF RESPONSIBILITY <u>PERSONAL CHARACTERISTICS</u>	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
22. Defends principle and conviction in the face of pressure.			X				Has not been fully tested on this...i.e., pressures from developers/Chamber/realtors to change Planning Board to meet their needs...what will happen?!
23. Uses language effectively in dealing with staff members, the Board and the public.		X					Several comments from Town Meeting members that he is overly general in response to questions.
24. Speaks well in front of large and small groups, expressing ideas in a logical and forthright manner.			X				

25. If you are willing to share any additional information, insight, or experience relevant to this evaluation, please do so here.

I think Larry is a good Town Manager. I think he could share power more gracefully and engage the Chair in sensitive negotiations (i.e., the UMass sewer fees). Sometimes he acts before he thinks or consults and therefore suffers retreat.

ALISA BREWER

AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvement	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
<p style="text-align: center;"><u>ORGANIZATION AND PROGRAM MANAGEMENT</u></p> <p>1. Plans and organizes the work that carries out policies and provides services established by Amherst Town Government Act, (Select Board, and Town Meeting) and State statutes.</p>					X		No deficiencies.
<p style="text-align: center;"><u>FISCAL MANAGEMENT</u></p> <p>2. Plans and organizes the preparation of an annual budget.</p>					X		Has been supportive of Board exploration of different ways of approaching their role in the annual budget process. Prepares materials in a timely fashion.
<p>3. Plans, organizes and administers the adopted budget within approved revenues and expenditures.</p>		X					Board is not kept informed of changes under his sole authority, so community often unaware of reasons. Quarterly budget reports should be offered & publicized with explanations of changes & their implications for future budget years.
<p>4. Seeks all possible revenue sources for the Town.</p> <p>a) Promotes Economic Development</p> <p>b) Explores regionalization</p> <p>c) Reorganizes town departments where feasible</p> <p>d) Explores new revenue sources from educational institutions</p>					X		Outstanding in every aspect. Has moved forward boldly and effectively. Greatest area of strength. Especially appreciated by commercial community, but also by residential taxpayers. Positive attitude with realistic – but not cynical – view of challenges. Exhibits both strength & flexibility in dealing with educational institutions.
<p style="text-align: center;"><u>PHYSICAL PLANT MANAGEMENT</u></p> <p>5. Plans and organizes maintenance of town-owned facilities, buildings and equipment.</p>				X			Urgent needs are being met. As fairly new Schools/Town Facilities Director gets past urgent needs, more planning & organizing will occur. Support for energy efficiency measures with both long and short term payoff especially notable.
<p>6. Plans and organizes maximum utilization of public facilities.</p>			X				As fairly new Schools/Town Facilities Director gets past urgent needs, more planning & organizing will occur. Understands public facilities may no longer be as available to the public due to costs.

AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
<p align="center"><u>RELATIONSHIPS WITH THE BOARD</u></p> <p>7. Keeps the Board informed on issues, needs and operations of the Town.</p>		X					Hesitates to inform Board unless desirous of feedback. Tendency to inform individual Board members, sometimes a subset, often all of them, but should more often inform entire Board at once in open meeting.
8. Makes professional recommendations to the Board on items requiring Bd action.					X		Professional recommendations have been clear & well-grounded.
9. Interprets and executes the intent of Board policy.						X	Board has provided little or no policy to be interpreted or executed.
10. Maintains a professional, impartial & effective working relationship with the Bd		X					Often Commendable, especially at activities outside of regular Board meetings. During Board meetings, too often jumps from obsequious to cavalier between one topic & the next. Patient with long-winded discussions.
<p align="center"><u>LONG RANGE PLANNING</u></p> <p>11. Plans and organizes a process of program planning in anticipation of future Town needs and problems.</p>			X				Strong plans but delayed followthrough make this less than Commendable. Examples: Blue Ribbon Panel, LSSE unitization study.
12. Maintains a knowledge of new technologies, systems and methods, etc. in relation to Town services.			X				Needs to push staff to provide updated web presence in all areas. Commendable attitude toward using technology considering his obvious initial reluctance to engage younger generation focused on electronic-communication, e.g, began a blog. Commendable support for improving efficiency & effectiveness through technology investments, e.g., field inspections.
<p align="center"><u>STAFF AND PERSONNEL RELATIONSHIPS</u></p> <p>13. Models sound personnel procedures and practices in oversight of human resources function.</p>	X						Initial willingness to dismiss clearly underperforming staff was Commendable. Current procedures & practices are obviously inadequate to address staff concerns. This inadequacy predates his arrival & is rooted in loyalty to tradition rather than commitment to effective best practices.

AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
14. Selects, leads, directs and develops Town staff.		X					Lack of financial resources does not explain lack of professional development opportunities. Leadership of staff is widely variable dependent on ability of staff to avoid refuting potential courses of action. Staff who accept all direction agreeably are treated favorably even without evidence of accomplishment, while those with proven ability & accomplishment are treated as difficult when providing possible downsides to initial direction.
15. Develops good staff morale and loyalty to the Town.	X						Survey of Department Heads/Sr. Management
16. Recruits and assigns the best available personnel in terms of their competencies.		X				X	Few new hires under current economic climate so difficult to judge; Veterans Agent hire appears Outstanding. Personnel assignment based on competency is an area of concern. Reassignment as part of professional development rather than punishment needs to be considered.
17. Leads the negotiations of labor contracts representing Town interests and Board guidelines.		X					Firefighters negotiation always challenging, but became unnecessarily contentious due to entrenched position that was not based on Select Board policy guidance.
<p data-bbox="342 1027 724 1057"><u>COMMUNITY RELATIONSHIPS</u></p> <p data-bbox="79 1089 930 1149">18. Gains respect and support of the Community on the implementation of Town programs and services.</p>		X					Notable missteps continue to reverberate: imposing sales fee on traditional Boy Scout Christmas Trees sales in Kendrick Park, dueling July 4 Parades, skating rink on Town Common and later in Kendrick Park. Rated as Needs Improvement rather than Unsatisfactory since these were all not Town programs and services he was implementing, but rather his own (uninfluenced by Board input) decisions. Choice of closing Town Hall to public transactions/services on Thursday mornings was well-chosen and well-implemented. Everyone appreciates that he is very visible in many community events outside official duties and clearly takes his membership in the community very seriously.

AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
19. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to public perception exists in employees coming in contact with the public.				X			Believe he expects this from employees. Have not heard any public complaints about public interaction with employees, only with process or procedure that predates his arrival.
20. Represents the Town to media as Chief Public Relations spokesperson on Town government issues.			X				Is available to the media as requested, doesn't hide. Quotes indicate positions not always clearly articulated and/or evaluated for impact.
<u>INTERGOVERNMENTAL RELATIONS</u>		X			X		Very impressed with the solid relationships he has built with the colleges and University in a relatively short period of time. Relationship with Hadley started strong e.g., economic development opportunities, but became contentious over EMT charges. Some towns perceived initial offers re: EMT services as insulting to traditional expectations.
21. Maintains awareness of developments and plans in other jurisdictions, including the colleges and university, that may relate to or affect Town government.							
22. Defends principle and conviction in the face of pressure.	X			X			Both Commendable & Unsatisfactory, as does not hesitate to defend principles, but sometimes unwilling to reconsider when more information becomes available.
23. Uses language effectively in dealing with staff members, the Board and the public.		X					Satisfactory with public & Board. Unsatisfactory with staff; frequent displays of anger or frustration via body language , volume, and sometimes word choice. Seems completely unaware of this effect on working relationships.
24. Speaks well in front of large and small groups, expressing ideas in a logical and forthright manner.					X		Especially effective with large groups. Terrific advocate at Town Meeting.
25. If you are willing to share any additional information, insight, or experience relevant to this evaluation, please do so here.							

TOWN MANAGER EVALUATION – Stephanie O’Keeffe

AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
<p style="text-align: center;"><u>ORGANIZATION AND PROGRAM MANAGEMENT</u></p> <p>1. Plans and organizes the work that carries out policies and provides services established by Amherst Town Government Act, (Select Board, and Town Meeting) and State statutes.</p>				X			Your general management of the Town is excellent. The Select Board is part of the management team and needs be more involved by having more information and providing more input. We need your help to make that happen so that we are moving forward together.
<p style="text-align: center;"><u>FISCAL MANAGEMENT</u></p> <p>2. Plans and organizes the preparation of an annual budget.</p>					X		By all evidence, the internal budget process works very well. The budget is delivered balanced and on time.
<p>3. Plans, organizes and administers the adopted budget within approved revenues and expenditures.</p>					X		
<p>4. Seeks all possible revenue sources for the Town.</p> <p>a) Promotes Economic Development</p> <p>b) Explores regionalization</p> <p>c) Reorganizes town departments where feasible</p> <p>d) Explores new revenue sources from educational institutions</p>					X		This has been a primary and vital area of concentration, and results to date are excellent and much appreciated.
AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
<p style="text-align: center;"><u>PHYSICAL PLANT MANAGEMENT</u></p> <p>5. Plans and organizes maintenance of town-owned facilities, buildings and equipment.</p>						X	I’m not aware of significant discussion on this topic.

6. Plans and organizes maximum utilization of public facilities.						X	I'm not aware of significant discussion on this topic.
<u>RELATIONSHIPS WITH THE BOARD</u>							
7. Keeps the Board informed on issues, needs and operations of the Town.		X					The Select Board needs to know much more about Town issues, needs and operations, and it needs to know earlier.
8. Makes professional recommendations to the Board on items requiring Board action.				X			By bringing more information to the Select Board earlier in the process, you will have more opportunity to make recommendations.
9. Interprets and executes the intent of Board policy.			X				With more information provided to the Select Board, Board policy will be more clear.
10. Maintains a professional, impartial and effective working relationship with the Board.			X				Providing more information to the Select Board will improve the effectiveness of the working relationship and ensure joint progress.
<u>LONG RANGE PLANNING</u>							
11. Plans and organizes a process of program planning in anticipation of future Town needs and problems.						X	This is a crucial area for the Town Manager and the Select Board to address. Except for Economic Development and Emergency Preparedness, I am not aware of significant long-term planning discussions.
12. Maintains a knowledge of new technologies, systems and methods, etc. in relation to Town services.						X	Again, important, and it's probably happening, but it isn't being discussed, so I have no knowledge for rating it.
<u>STAFF AND PERSONNEL RELATIONSHIPS</u>							
13. Models sound personnel procedures and practices in oversight of human resources function.		X					The Staff Questionnaires identified management and communication issues as an area requiring more attention and sensitivity. I am confident that you will appreciate knowing this, and that you will use it as an opportunity for growth and improvement.
14. Selects, leads, directs and develops Town staff.		X					Per above.
15. Develops good staff morale and loyalty to the Town.		X					Per above.

<p style="text-align: center;">AREAS OF RESPONSIBILITY</p> <p style="text-align: center;"><u>STAFF AND PERSONNEL RELATIONSHIPS continued</u></p>		Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
16. Recruits and assigns the best available personnel in terms of their competencies.					X			While I have concerns about some personnel assignment decisions, I generally think this is a strength.
17. Leads the negotiations of labor contracts representing Town interests and Board guidelines.							X	This is an area that needs far more discussion. Labor contracts are being successfully negotiated, and that is appreciated, but it occurs with little Board knowledge and no Board input.
<p style="text-align: center;"><u>COMMUNITY RELATIONSHIPS</u></p> <p>18. Gains respect and support of the Community on the implementation of Town programs and services.</p>				X				There have been some hot-button issues that could have been handled better. I am confident that you recognize that and have learned from those. Working more closely with the Select Board before changing or creating programs and services will help ensure better results and head-off potential problems. The Kendrick Park Committee is a stellar example of gaining community respect and support.
19. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to public perception exists in employees coming in contact with the public.						X		Town employees have long been viewed as helpful and courteous, and that continues under your management. Also, ongoing changes to the permitting process have improved a significant public perception and interaction issue.
20. Represents the Town to media as Chief Public Relations spokesperson on Town government issues.						X		I think you do a very good job with this.
<p style="text-align: center;"><u>INTERGOVERNMENTAL RELATIONS</u></p> <p>21. Maintains awareness of developments and plans in other jurisdictions, including the colleges and university, that may relate to or affect Town government.</p>							X	Very important. I hope it's happening, but if it is, the Board is not well-informed about it, except to the degree it requires approvals, such as with Amherst College construction around downtown.

AREAS OF RESPONSIBILITY <u>PERSONAL CHARACTERISTICS</u>	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
22. Defends principle and conviction in the face of pressure.				X			Most often, very effectively. Occasionally, not enough (budget issues) and occasionally, too much (citing powers from Town Government Act as defense is heavy-handed.) More communication and better information flow are the panacea.
23. Uses language effectively in dealing with staff members, the Board and the public.			X				The inclination to be guarded with details at Select Board meetings and speak in vague generalities is unnecessary in all but the most delicate situations, but this is getting better. Issues related to communication with staff are noted above as needing improvement.
24. Speaks well in front of large and small groups, expressing ideas in a logical and forthright manner.					X		Your public speaking skills are a real strength and valuable for the Town.

25. If you are willing to share any additional information, insight, or experience relevant to this evaluation, please do so here.

- This form does not capture the degree to which I think you are doing an excellent job managing the Town overall. I think you are systematically identifying and addressing areas of needed improvement and you are successfully juggling many important efforts. Much progress has been made, concrete results have been achieved and pieces are in place for future successes. Yet another reason for providing more info to the Select Board at our meetings is to better trumpet your successes, details of which may otherwise go little-noticed. In that regard, I particularly appreciated the “self evaluation” you provided to us.
- My highest praise is for your sharp focus on economic development and revenue growth. Also exemplary are the relationships forged with UMass and Amherst College.
- You have done a tremendous job with outreach and responsiveness to residents, businesses and community groups. Your friendliness, high-visibility and openness to suggestions and concerns have made many feel they have an ally and advocate at Town Hall. You immediately recognized the importance of this, made it a priority, and have excelled in this regard. That is to be commended. I am confident that you will similarly embrace the necessity of engaging Town staff and fostering the same goodwill and optimism for internal government relations. The employees are Town government’s most vital resource and must be nurtured as such.
- Extra attention is needed for ensuring balance between responsiveness and priorities. Requests from Select Board members, residents and others must be queued appropriately to respect departmental work and resources. For Select Board requests, we depend on you to advise us about what is appropriate and necessary – and what isn’t – rather than simply telling us “Yes.”

- Efforts are ongoing to improve communication and clarify mutual expectations between the Select Board and you, and your willingness to adapt to these changes is much appreciated. I believe that providing us with much more information about current and future issues and actions – actual or potential – and doing so very early and with frequent updates, is key. I recognize and appreciate the efforts you have been making in this regard.
- The Select Board and the Town Manager need to work more closely to be more effective. Dealing with the shifting expectations of a Select Board that changes with each election are challenging circumstances to work under, and I don't envy you that. This evaluation only addresses your side of the equation, but it is clear that we have a responsibility to improve our performance as well. I look forward to much success with all of us working together.

Stephanie O'Keeffe

1. Commendable—It is good that Mr. Shaffer implements the policies formulated by the Select Board. I approved of Mr. Shaffer's decision that the July 4th parade should respect free speech. I think that this should have been resolved more quickly by Mr. Shaffer working with the Select Board to divide the day into morning for the private parade and the afternoon for the public parade. The private parade folks will not come round so we should have just made a policy that did not close them out but left the afternoon for the LSSE parade. Similarly, the Christmas Tree/Kendrick park decision was an error that keeps reverberating. I think asking the Select Board to come up with a policy after offering his opinion would have been better all the way around.
2. Commendable—Mr. Shaffer does a fine job of preparing the budget save for the fact that he ignored the Select Board's specific request to maintain human services and the War Memorial Pool. Those requests were reasonable and should have been honored.
3. Outstanding—We always seem to have balanced books.
4. Outstanding—These areas are Mr. Shaffer's greatest strength. In all areas (a-d) he simply excels and the Town should and often does recognize his competence. It is not easy to move this Town toward economic development but we need it.
5. Outstanding—The buildings and facilities always appear well maintained.
6. Unable to judge.
7. Outstanding—We do learn about issues, needs, operations etc. during the Town Manager's report and often ahead of time by a phone call which is much appreciated.
8. Outstanding—Mr. Shaffer's recommendations often convey a legal opinion or a best practice and typically seem reasonable.
9. Commendable—Mr. Shaffer usually interprets and executes the intent of the Board's policy. The issue that troubles sometimes is whose policy something should be—the Town Manager's or the Select Board. See number 1.
10. Commendable—No matter what, I feel I can bring the issue to Mr. Shaffer and will be treated with respect and consideration. We may not always agree but our relationship (his and mine) and his with the other Select Board Members is usually very cordial. There have been a very few instances (noted by the public) where he said his position trumped ours, and that was not well received.
11. Outstanding—Even Mr. Shaffer's critics usually admit that Mr. Shaffer really cares about improving the Town's economic base and is working toward a long range and improved future for the town.
12. Outstanding—Mr. Shaffer has supported the efforts of IT, and Amherst has an outstanding, prize-winning web site achieved with in-house staff. Mr. Shaffer has started a blog on that site so citizens can see what he has been doing and it is a great way to inform the Town. I hope more people read it to discover his many activities on their behalf.
13. Needs improvement—From several of the staff evaluations, I gather that human services is not functioning at the level it should. This appears to have been a long standing problem—from before Mr. Shaffer arrived. However, it appears to need fixing. Human resources should search for the best people to fill positions and match talents to the job. Perhaps the heads of departments who are searching need to work more closely with human resources to craft ads for the position. Staff evaluations include both positive and negative reviews. Some of this negativity may well be due to the fact that some staff don't want change. But other points seem valid.
14. Commendable—except for above. I think the people who work for the Town that I know personally are excellent and appear to know what they are doing.
15. Needs improvement—The Firefighters are clearly very unhappy and contract negotiations have gone on too long. Some departments are not happy with jokes made at their expense. Mr. Shaffer is very generous in public with his praise for many departments and staff. But it would be good to drop the teasing as it appears to offend some.
16. Commendable-- I think the people who work for the Town that I know personally are excellent and appear to know what they are doing. My only reservation concerns some staff or town evaluators that feel human resources could be improved.
17. Commendable—Except for the fire department, contracts seemed to be settled in a timely way, and within budget guidelines. I am glad that Mr. Shaffer would not reopen finished contract talks to lower wages and benefits because of budget pressures as some would like.
18. Commendable—In general, the Town supports Mr. Shaffer in terms of zoning articles, working hard on improving permitting, searching for every way to increase revenue, exploring new economic development. They are grateful for the new energy and viewpoint he brought to Town. Cherry Hill is a great example of a rescued drain going to a positive gain.
19. Unable to judge how much Mr. Shaffer influences this in the Town employees. I surely find that I am always treated with courtesy and sensitivity but I don't know how he is involved with fostering this in employees.

20. Outstanding—He issues press releases on behalf of the Select Board such as when we needed more applicants for committees and I believe he is willing and able to talk with the press when queried.
21. Outstanding—He seems on top of developments and plans in other jurisdictions; he certainly has done much more to get funding from UMass and Amherst College than his predecessor. He implemented a cooperative agreement with the UMass police and explored regionalization efforts.
22. Commendable—But also willing to change a previous stance and remains open to argument.
23. Unable to judge with staff members but commendable with Board and the Public. His language during the possible water contamination was just right. Not alarmist but factual and reassuring and honest.
24. Outstanding-- He is a willing speaker on behalf of the Town and, on those occasions when I have heard him such as at Chamber breakfasts or at the League of Women Voters, he has spoken well and to the point.
25. There are some problems not covered above. One is shared with the Select Board. A citizen describes a problem to Select Board. The Select Board and Mr. Shaffer say they will work on it, but the problem never gets resolved. We need to fix this in some orderly way. Some issues from the staff evaluations raised concerns. For example, some departments might welcome a visit. One could also find out how well a department is working or how it could be improved by getting staff to evaluate their department heads. If suggestions are made for improvements, do consider implementing them. It will build loyalty and morale. I do worry about the Firefighters' comments such as ambulance fees and fire codes. HOWEVER, I do believe that Mr. Shaffer is doing an excellent job overall and his list of accomplishments in his Performance Evaluation is truly impressive. His close attention to detail has saved the Town money in several important ways that many are scarcely aware of: Cherry Hill, the Veterans Affairs, legal fees, Ambulance payments, PILOTS etc. He has increased the safety of the Town with the reverse 911 ability and with the Emergency Management Plan and while terrorists are not likely in Amherst, we do live in a nuclear zone and have had hurricanes here in the past. From my own interactions, I am grateful for Mr. Shaffer's consideration of the problems I bring to him and his dealings with these issues have been consistently fair. I appreciate his willingness to work hard on economic issues—not easy in a Town like Amherst (where only the h is silent!) and where a lot of us, me included, remember the good old days!

TOWN MANAGER EVALUATION – GERRY WEISS

AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
<p style="text-align: center;"><u>ORGANIZATION AND PROGRAM MANAGEMENT</u></p> <p>1. Plans and organizes the work that carries out policies and provides services established by Amherst Town Government Act, (Select Board, and Town Meeting) and State statutes.</p>					x		You have a firm grasp of the ATGA. When in gray areas, it would, in my mind, be better to work more closely with the SB to craft interventions
<p style="text-align: center;"><u>FISCAL MANAGEMENT</u></p> <p>2. Plans and organizes the preparation of an annual budget.</p>					x		
<p>3. Plans, organizes and administers the adopted budget within approved revenues and expenditures.</p>				x			I appreciate that all managers like to have the ability to move money around; it seems that at times, this has given you (like other managers) the power to work around SB policy and/or Town Meeting appropriations
<p>4. Seeks all possible revenue sources for the Town.</p> <p>a) Promotes Economic Development</p> <p>b) Explores regionalization</p> <p>c) Reorganizes town departments where feasible</p> <p>d) Explores new revenue sources from educational institutions</p>					x		Outstanding work to date. You have been, and are addressing and working on all 4 areas consistently and effectively.
AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)

<u>PHYSICAL PLANT MANAGEMENT</u>						x	This seems to be an area that other staff take the lead on. You certainly are supportive of those efforts and have kept maintenance as a priority
5. Plans and organizes maintenance of town-owned facilities, buildings and equipment.							
6. Plans and organizes maximum utilization of public facilities.						x	Again, other staff seem to be responsible in this area.
<u>RELATIONSHIPS WITH THE BOARD</u>				x			Outstanding with the Chair. However, a different system of informing all board members needs to be worked out with the SB.
7. Keeps the Board informed on issues, needs and operations of the Town.							
8. Makes professional recommendations to the Board on items requiring Board action.				x			A difficult balancing act – keeping us informed while using your judgment as to the best timing to release information to the public. During open session time, your recommendations are clear and informative.
9. Interprets and executes the intent of Board policy.				x			One notable exception: disregarding some of the SB's policy instructions when designing the 09 budget
10. Maintains a professional, impartial and effective working relationship with the Board.					x		Outstanding in his relationship with me; and during board meetings.
<u>LONG RANGE PLANNING</u>				x			Your work on the future finances in its many aspects is noteworthy; as well as in the area of emergency preparedness and the future of fire/ems services. Some lack of follow through on certain items – Blue Ribbon Task Force is one example.
11. Plans and organizes a process of program planning in anticipation of future Town needs and problems.							
12. Maintains a knowledge of new technologies, systems and methods, etc. in relation to Town services.					x		While most of the credit belongs to Mr. Pakunas, it seems clear to me that you are actively engaged in the IT process
<u>STAFF AND PERSONNEL RELATIONSHIPS</u>		x					This is an area that the staff questionnaire and other forms of feedback have informed me; it would be my wish that you will study comments from staff and the SB and come up with a plan to address these issues
13. Models sound personnel procedures and practices in oversight of human resources function.							
14. Selects, leads, directs and develops Town staff.		x					Selection of new staff has been excellent; questionnaire indicates problems elsewhere; needs to be addressed – see #13
15. Develops good staff morale and loyalty to the Town.	x						Staff questionnaire suggests there are serious problems in this area.. See #13

AREAS OF RESPONSIBILITY		Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
<u>STAFF AND PERSONNEL RELATIONSHIPS continued</u>								
16. Recruits and assigns the best available personnel in terms of their competencies.				x				A mix of results in this area. Reorg of Cherry Hill management and Veteran's Services exemplary
17. Leads the negotiations of labor contracts representing Town interests and Board guidelines.				x				Not an area that the SB has much of a role in; it appears that you think about the best interests of the town in your negotiations
<u>COMMUNITY RELATIONSHIPS</u>						x		Community feedback is very positive, save for the response regarding the Boy Scouts.
18. Gains respect and support of the Community on the implementation of Town programs and services.								
19. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to public perception exists in employees coming in contact with the public.					x			It's not clear how you have involved yourself in this area. Feedback from the community indicates that there are mixed feelings about how they are treated by some staff; feedback also indicates improvement in some areas since your arrival
20. Represents the Town to media as Chief Public Relations spokesperson on Town government issues.						x		
<u>INTERGOVERNMENTAL RELATIONS</u>						x		You appear to have devoted a great deal of time in this area.
21. Maintains awareness of developments and plans in other jurisdictions, including the colleges and university, that may relate to or affect Town government.								

AREAS OF RESPONSIBILITY <u>PERSONAL CHARACTERISTICS</u>							Comments (Please use the back of the page for addition space)
	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	
22. Defends principle and conviction in the face of pressure.		x			x		Though I don't always agree with your stance, I feel you defend it in the face of pressure; your hesitancy to shift your position when new information enters can be a problem.
23. Uses language effectively in dealing with staff members, the Board and the public.		x			x		You seem to be feeling your way on how best and how much to communicate. Staff questionnaires reflect room to improve with staff; feedback from Town Meeting members indicates a tendency to obfuscate at times; communication with me is outstanding
24. Speaks well in front of large and small groups, expressing ideas in a logical and forthright manner.				x			With the exception of some moments in Town Meeting, I find your public presentation refreshing and outstanding.

25. If you are willing to share any additional information, insight, or experience relevant to this evaluation, please do so here.

Overall, I think you are doing an outstanding job working with the SB and with community; improving our financial picture, pursuing new avenues of income, reorganizing town departments, putting Amherst in a position to be a key player in the entire area, and making Amherst much more emergency ready. When we hired you, we made it clear that certain areas needed addressing, and in my mind, you have addressed these areas extremely competently and professionally in most cases:

1. You are expanding our relationship with the educational institutions and getting more payments in lieu of taxes from same.
2. You are exploring areas to increase our capacity for economic development. You have done this via your support for modest zoning changes, exploring the potential for one large development (Patterson property), working closely with UMass on potential developments; working more closely with the business community.
3. You have changed the budget process to be more responsive to the SB and to create a process that is logical and conducive to collaboration.
4. You are addressing problem areas of town functioning. However, it appears that some major problems have persisted under your watch.
5. You are addressing inefficiencies in town departments and looking for ways to cut costs and/or reorganize. I am concerned about your handling of personnel issues during reorganizations.
6. You are looking for opportunities to regionalize services.

You have also worked hard solve problems that the community brings to us; to look forward to avoid costly lawsuits; to make yourself available to individuals and organizations, to be innovative in looking for ways to cuts costs and raise revenues; to apply a helpful attitude when approached by these individuals and organizations when feasible. You are to be commended for all that you have done.

As indicated above, the area that needs attention is your relationship with staff. The questionnaires reflected a range of responses, from unsatisfactory to outstanding. In my mind there were enough “unsatisfactory’s” to warrant our asking you to address this immediately.

I look forward to continuing to work with you and to continue what I feel has been a very rewarding relationship that has made my time on the board rich, informative, creative, energetic and fun.

